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4 STEVEN HEREDIA, et al.,
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6 Plaintiffs,
7
8 v.
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10 WELLS FARGO BANK, NATIONAL
11 BANK,
12 Defendant.

Case No. [16-cv-02820-DMR](#)

**ORDER REFERRING CASE TO ADR
UNIT FOR ASSESSMENT TELEPHONE
CONFERENCE**

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13 Pursuant to Civil Local Rule 16-8 and ADR Local Rule 2-3, the court refers this
14 foreclosure-related action to the Alternative Dispute Resolution (ADR) Unit for a telephone
15 conference to assess this case's suitability for mediation or a settlement conference. Plaintiffs and
16 defendants' counsel shall participate in a telephone conference, to be scheduled by the ADR Unit
17 at its earliest convenience.

18 Plaintiffs and defendant's counsel shall be prepared to discuss the following subjects:

- 19 1. Identification and description of claims and alleged defects in loan documents.
20 2. Prospects for loan modification.
21 3. Prospects for settlement.

22 The parties need not submit written materials to the ADR Unit for the telephone
23 conference.

24 In preparation for the telephone conference, plaintiffs shall do the following:

- 25 1. Review relevant loan documents and investigate the claims to determine whether
26 they have merit.
27 2. If plaintiffs are seeking a loan modification to resolve all or some of the claims,
28 plaintiffs shall prepare a current, accurate financial statement and gather all of the

United States District Court
Northern District of California

1 information and documents customarily needed to support a loan modification
2 request. Further, plaintiffs shall immediately notify defendants' counsel of the
3 request for a loan modification.

- 4 3. Provide counsel for defendants with information necessary to evaluate the
5 prospects for loan modification, in the form of a financial statement, worksheet or
6 application customarily used by financial institutions.
7 4. In preparation for the telephone conference, counsel for defendants shall do the
8 following.
9 5. If defendants are unable or unwilling to do a loan modification after receiving
10 notice of plaintiffs' request, counsel for defendants shall promptly notify plaintiffs
11 to that effect.
12 6. Arrange for a representative of each defendant with full settlement authority to
13 participate in the telephone conference.

14 The ADR Unit will notify the parties of the date and time that the telephone conference
15 will be held. After the telephone conference, the ADR Unit will advise the court of its
16 recommendation for further ADR proceedings.

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18 **IT IS SO ORDERED.**

19 Dated: September 1, 2016
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